University of California CDL California Digital Library

CDL Hosted Archon Service – User Guide

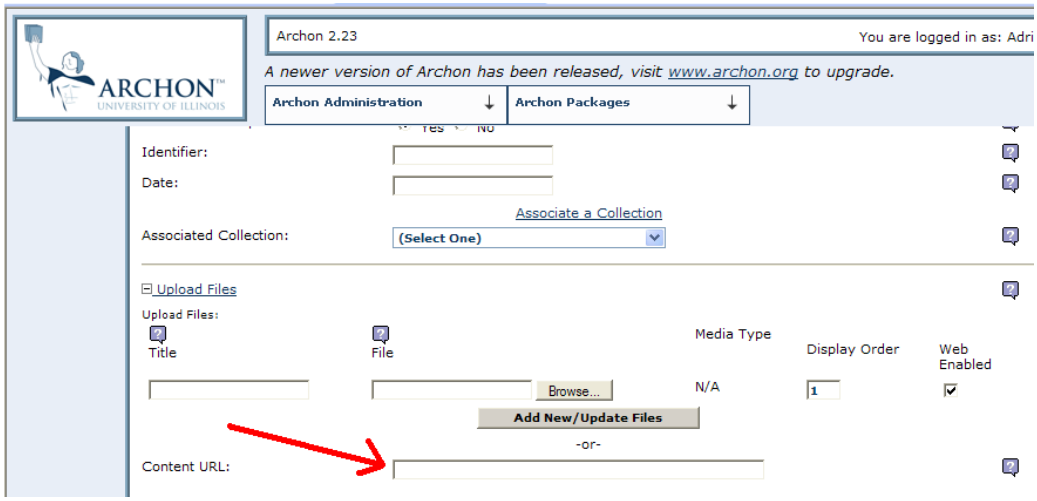
These instructions are intended for reference by users of our CDL Hosted Archon service.

They are also suitable for reference by repositories that are implementing a local instance of Archon. The following sections are relevant for these cases: Section 2 (see **Repository Settings** requirements only) and Sections 3-5.

1. Usage Notes

Archon provides two general features that have particular usage implications, within the context of our Hosted Archon Service. For additonal information about these features, see the Archon User Manual (http://www.archon.org/UserManualv2.21.pdf):

- **Public (End User) Interface:** Please note that this particular Archon feature is not enabled, restricting public access to the collections. The default Archon public interface includes all collections maintained by all repositories, and cannot be customized or modified by repository at this time; hence, we have not activated this feature. We recommend submitting completed EAD collection guides to the OAC for publication.
- **Digital Library Package**: You can use this feature to describe digital objects associated with a finding aid. When creating digital objects, you have the option to either 1) upload files associated with the object, or 2) input a URL to an online location of the file (see **Content URL** field in image below). ***Do not upload digital files to the CDL Hosted Archon database.*** If you are creating digital objects, you must place associated files on a local webserver, and then use the **Content URL** field to indicate the location of the file on your webserver.



2. Archon Setup (Version 2.23)

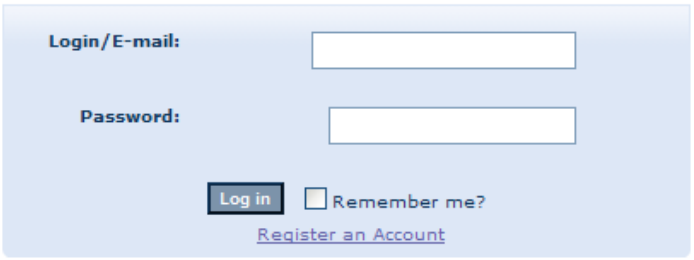
Setup
We will provide the following initial setup for your institution:

- A single user account (**"Power Users"** permission level) for the primary contact at your repository.
- An entry for your repository.

Connection Settings
Use the following settings when accessing the OAC Archon interface via any web browser. Your **Login/E-mail** and a temporary **Password** will be provided to you by the CDL.

Please change your password once you've connected to the application. Once logged in, select Archon Administration → My Preferences.

- **Administration Interface:** http://voro.cdlib.org:8084/Archon/?p=admin
- **Public Interface *(Not Enabled)*:** http://voro.cdlib.org:8084/Archon/



After you log in, the staff view of the public view will display. You can add/edit information by clicking on the 'Admin' bottom of any page in the staff view.

Repository Settings
As part of the initial setup process, we will create an entry for your repository. To view the current settings, login as 'Admin'**.** Select Archon Packages → Collections → Repository Manager. Select your repository to view the settings. You can feel free to modify the settings, but data is required in the following fields in the "Repository Manager" section in order to meet *OAC Best Practice Guidelines for Encoded Archival Description, Version 2.0* (OAC BPG EAD) specifications:

- Repository Name
- MARC Organization Code

3. Collection Description Requirements for OAC

The *OAC Best Practice Guidelines for Encoded Archival Description, Version 2.0* (OAC BPG EAD) must be followed when contributing XML finding aids to the OAC.

The following tables list out Archon data entry fields that should have data, in order to meet the OAC BPG "OAC Basic" level encoding scheme requirements. The OAC Basic encoding scheme reflects single-level descriptive outputs at any level, but typically for large accumulations such as collections, record groups, fonds, or record series. It can, however, only describe materials at one explicitly articulated level and does not support multilevel encoding of subsequent lower levels (the "OAC Full" encoding scheme).

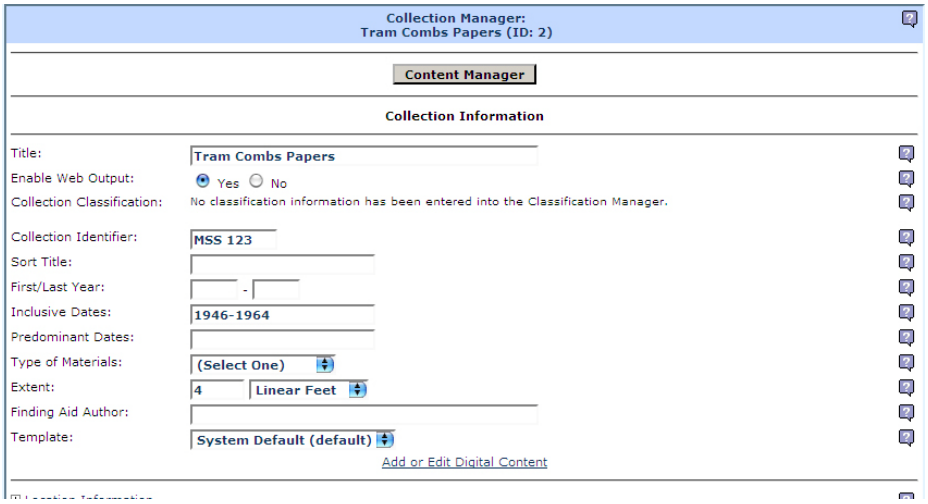
The third column in these tables references the page in which the elements and attributes guidelines tables appear in the OAC BPG EAD. Please refer to these pages for more detailed information.

Collection Information

- Login as **Admin**, select **Archon Packages**, select **Collections Manager**, then select **(Add New)**.
- Enter a **Title**.
- Enter the unique **Collection Identifier.**
- Enter a **Inclusive Dates** for the materials.
- Enter the **Extent Number** (cubic feet or linear feet).
- Click on the **"Next"** button at the bottom the window.

Table 1

Archon Label	EAD	OAC BPG EAD Citation
Title	<unittitle>	pg. 12
Collection Identifier	<unitid>	pg. 12
Inclusive Dates (First/Last Year)	<unitdate> NORMAL	pg. 12
Extent	<extent>	pg. 13

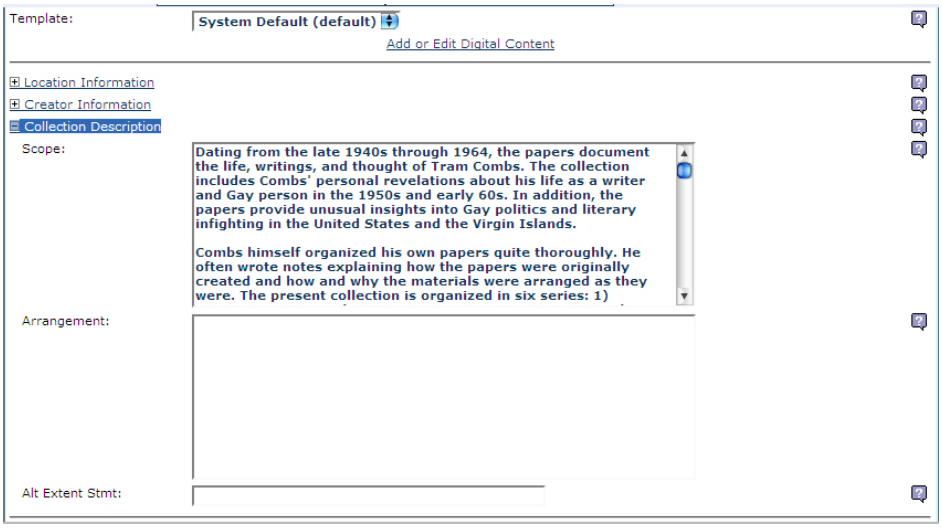


Collection Description

- Click on the expanding **+** to open up the **Collection Description** section.
- Enter one **Scope** note to provide a prose statement summarizing the document types, formats, and topical coverage of the collection.
- Click on **Update**.

Table 2

Archon Label	EAD	OAC BPG EAD Citation
Scope	<scopecontent>	pg. 14


Template:
System Default (default)
Add or Edit Digital Content
Location Information
Creator Information
Collection Description
Scope:
Dating from the late 1940s through 1964, the papers document the life, writings, and thought of Tram Combs. The collection includes Combs' personal revelations about his life as a writer and Gay person in the 1950s and early 60s. In addition, the papers provide unusual insights into Gay politics and literary infighting in the United States and the Virgin Islands.
Combs himself organized his own papers quite thoroughly. He often wrote notes explaining how the papers were originally created and how and why the materials were arranged as they were. The present collection is organized in six series: 1)
Arrangement:
Alt Extent Stmt:

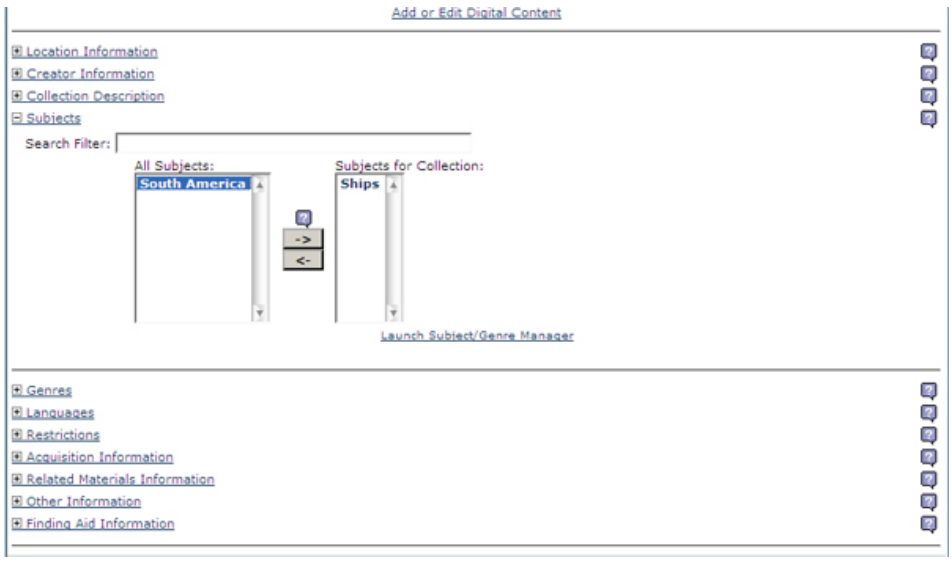
Subjects

In order to promote content access to collections, the OAC requires at least three controlled access headings encoded using the following subelements: <persname>, <famname>, <corpname>, <title>, <geogname>, <genreform>, <occupation>, or <function>.

- Click on the expanding **+** to open up the **Subjects** section.
- If the subject isn't listed in **All Subjects**, click on **Launch Subject/Genre Manager** to add other subjects (personal name, family name, etc.)
- Click on **Update**.

Table 3

Archon Label	EAD	OAC BPG EAD Citation
	<controlaccess>	
Subjects	<persname>	pg. 15
Subjects	<subject>	pg. 18
Etc.		pg. 15-21

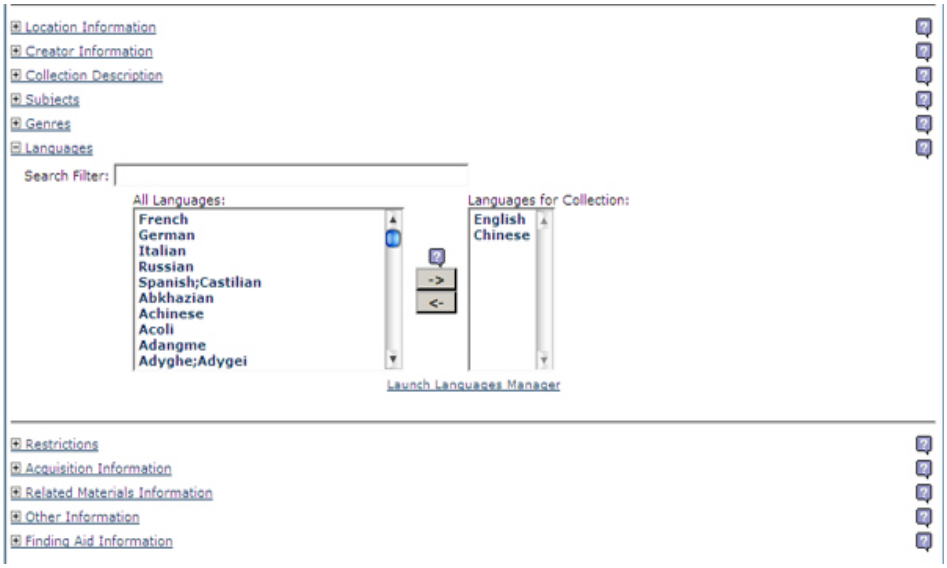


Languages

- Click on the expanding **+** to open up the **Languages** section.
- Select the language(s) used in the materials of the collection.
- Click on **Update**.

Table 4

Archon Label	EAD Elements	OAC BPG EAD Citation
Language	<langmaterial>	pg. 14

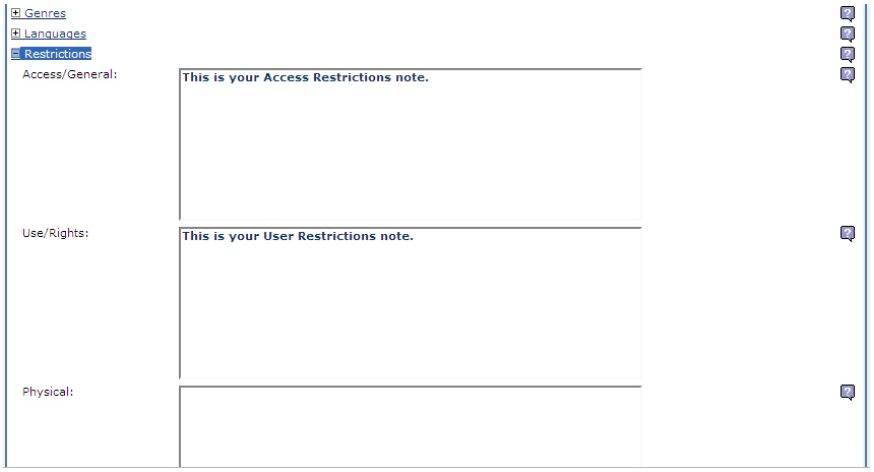


Restrictions

- Use one **Access/General** note to record particular access restrictions, even if the collection has no access.
- Use one **Use/Rights** note to tag for conditions governing the use of a collection after access has been provided.
- Click on **Update**.

Table 5

Archon Label	EAD	OAC BPG EAD Citation
Access/General	<accessrestrict>	pg. 14
Use/Rights	<userestrict>	pg. 14



Acqusition Information

- Click on the expanding **+** to open up the **Acquisition Information** section.
- Entered the **Initial Date Acquired**.
- Click on **Update**.

Table 6

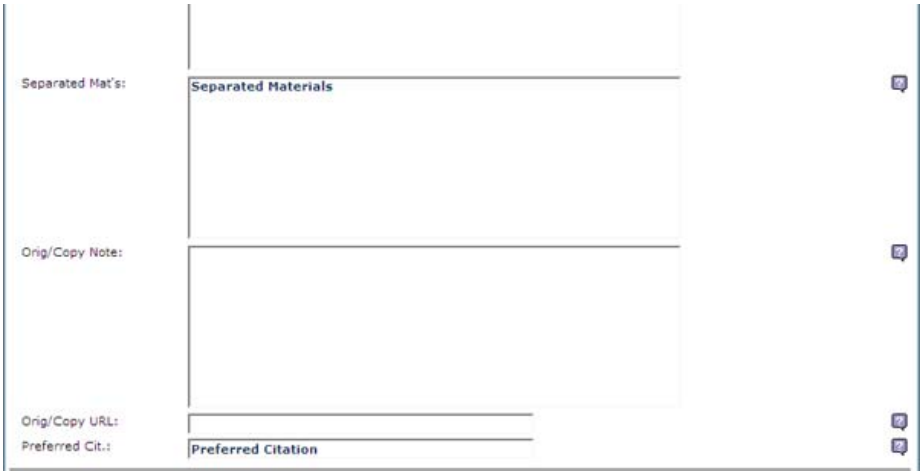
Archon Label	EAD	OAC BPG EAD Citation
Acquisition Information	<acqinfo>	pg. 14

Related Materials Information

- Click on the expanding **+** to open up the **Related Materials** section.
- Entered the **Preferred Citation**.
- Click on **Update**.

Table 7

Archon Label	EAD	OAC BPG EAD Citation
Preferred Cit.	<prefercite>	pg. 14



Finding Aid Information

- Click on the expanding **+** to open up the **Finding Aid Information** section.
- Entered the year the collection description was written in **Publication Date**.
- Enter the language in which the collection description was written in **Written In**.
- Click on **Update**.

Table 8

Archon Label	EAD	OAC BPG EAD Citation
Publication Date	<creation><date>	pg. 11
Language	<langmaterial>	pg. 14

4. Before Sumbitting to the OAC

OAC requires the following additional encoding, which is not supported by Archon in the EAD export file.

Archon users must manually add this data to their finding aids after exporting from Archon in order to meet *OAC Best Practice Guidelines for Encoded Archival Description, Version 2.0* (OAC BPG EAD) specifications. You can use a simple text editor or XML authoring tool to add this data (for references, see our EAD Toolkit).

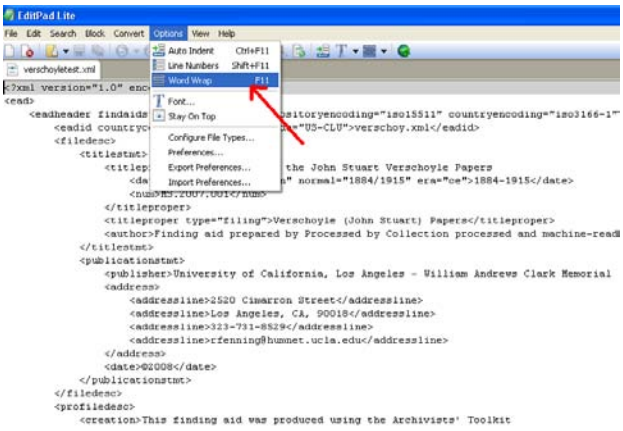
Below is a table indicating the required EAD tag/attribute, the location of the required encoding in an EAD instance (represented in XPath syntax), and a reference to the OAC BPG EAD guidelines for additional information.

EAD Tag/Attribute	EAD Encoding Location (XPath)	OAC BPG EAD Citation
<titleproper> TYPE="FILING"	ead/eadheader/filedesc/titlestmt/titleproper[@type]	OAC requires a second <titleproper> with a type set to “filing”. Encode the *filing title* of the finding aid and not the title of the fonds or record group being described.

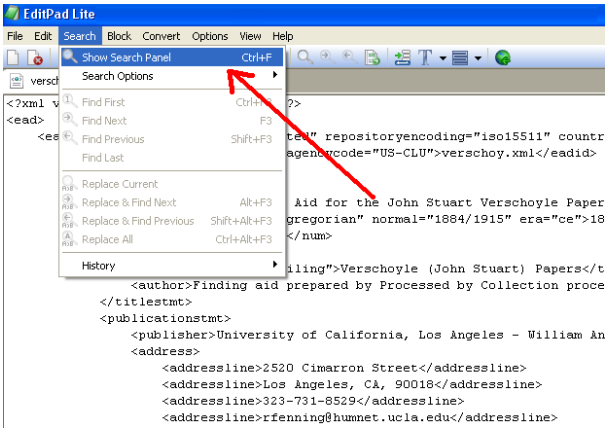
		Example:
		
		Archon Output:
		
		`<titleproper>William J. Clinton Papers</titleproper>`
		
		Manual Output:
		
		`<titleproper>William J. Clinton Papers</titleproper> <titleproper type=”filing”>Clinton (William J.) Papers</titleproper>`

To update your EAD file, we suggest using a simple text editor (such as EditPad or Note Tab) or a XML authoring tool (such as oXygen). Below is a summary of the editing process, using the free EditPad Lite software as an example:

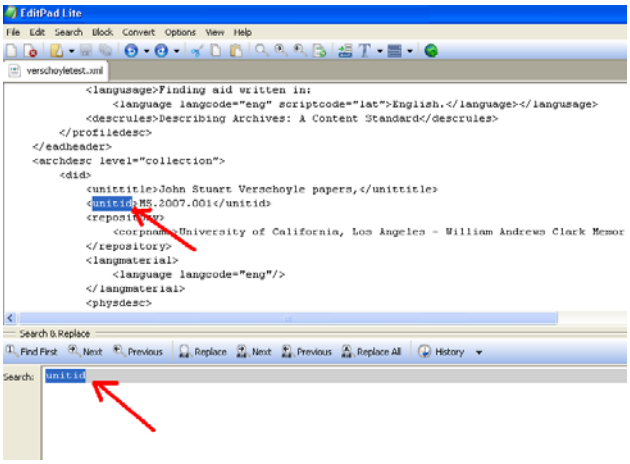
1. Open the EAD file, using the text editor
2. From the toolbar, select select "word wrap" as a viewing option (in EditPad, select Options->Word Wrap)



3. From the toolbar, select the option to search for text in the file (in EditPad, select Search->Show Search Panel)



4. Search for the first occurrence of </titleproper> (in EditPad, enter the search term and select "Find First" to find the text)



5. Insert a <titleproper type="filing"> tag, just *after* the last </titleproper> tag. Within <titleproper type="filing">, enter the filing title for the finding aid. Note that <titleproper type="filing"> must also be closed with </titleproper>. For example (see red text for the added encoding):

```
<titlestmt>
<titleproper>Finding Aid for the John Stuart Verschoyle
Papers</titleproper>
<titleproper type="filing">Verschoyle (John Stuart)
Papers</titleproper>
...
```

6. Once you're done with the edits, save the file.

5. Questions? Problems? Who to Contact for Assistance

The Archon User Manual, Version 2.21 can be found at: http://www.archon.org/UserManualv2.21.pdf

We maintain an online forum for the CDL Hosted Archon Service at: http://www.getsatisfaction.com/dsc/products/dsc_cdl_hosted_archon. Feel free to join discussions with other users, ask questions, report problems, or request support.

Alternatively, you can report problems or send requests for support to our helpdesk system via email at oacops@cdlib.org– indicate “Archon” in your subject line. When reporting technical issues with the applications, please note specific steps that you took before encountered the error -- and please also note any specific error messages. This will help us track and troubleshoot the problem.